GUIDE

Reinventing Quality Programs

Harnessing AI-enabled technologies to up-level QA, compliance, and coaching.

OBSERVE·AI

For more than 40 years, contact center quality assurance (QA) has been a foundational part of enhancing agent performance, ensuring compliance, and improving the customer experience. Although automation has grown across contact centers with strides in IVR and chatbots, phone support is still a key function. At the end of the day, customers often just want to talk to a human.

44%
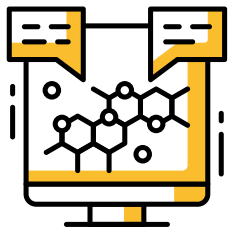
OF PEOPLE SURVEYED IN THE U.S. PREFER PHONE OR VOICE AS THEIR PRIMARY CUSTOMER SERVICE CHANNEL.

THAT'S 21% HIGHER THAN ANY OTHER CHANNEL AVAILABLE, WITH LIVE CHAT COMING IN SECOND AT 23%.

But today, QA programs in contact centers are marred with inefficiencies across entire organizations.

CONTACT CENTER QA: THE PROCESS OF MEASURING OVERALL PERFORMANCE OF AGENTS AND GATHERING ACTIONABLE INSIGHTS TO IMPROVE PERFORMANCE AND OPTIMIZE THE CUSTOMER EXPERIENCE.

1. Low Coverage Volume: Only 1-2% of recorded voice calls are actually analyzed.. As a result 2-4 calls are typically quality checked per agent per month It begs the question, what if you happen to QA a top agent's two worst calls of the month?

2. Manual Processes: In most cases, the quality assurance process is entirely manual. Meaning, analysts use multiple systems and spreadsheets just to quality check a single call.

3. Subjective Scoring: Analysis is subjective - it's up to the scorer. Every analyst scores calls differently. Scoring isn't scientific and data-driven.

4. Quality of Agent Feedback: With a subset of the total insights, training teams cannot effectively tailor coaching programs relevant to individual agents. As a result, they're compelled to train entire teams on general topics.

5. Lack of Benchmarking: Performance standards aren't clear. How can teams effectively improve performance if they if they can't make data-driven decisions?

With poor quality management, evaluations, and suboptimal training programs, organizations are missing out on opportunities to work much more efficiently. At the same time, they are not harnessing the wealth of insights they can gather on customer sentiment and agent performance when they analyze 100% of their calls.

Enter Voice AI

WHAT IS VOICE AI?

AN AI TECHNOLOGY THAT USES ADVANCEMENTS IN NATURAL LANGUAGE PROCESSING AND SPEECH RECOGNITION TO ANALYZE 100% OF CALLS AND ENABLE AGENTS WITH COACHING AND INSIGHTS.

Jimmy is a customer service agent. Jimmy's quality analyst pulls a random call and it just so happens that they caught Jimmy on a bad day. He forgot to mention something, or got a bit flustered. At the end of the day, it's only one call, and it's definitely not indicative of Jimmy's all-around performance. But the quality analyst doesn't know that. There's no other data to back that. All there is is one call.

This is why quality programs at contact centers today are broken. Nuances aren't taken into account. Outliers are used to represent an entire performance profile. As a result, coaching and training isn't consistent or understood. However, that's changing.

> Advances in artificial intelligence, machine learning, and speech analytics are transforming the contact center as we know it, at every level of the organization. Understanding customer conversations, every single one taking place daily, is what will drive the ultra-efficient contact centers of the future.

The unifying technology behind it all? **Voice AI.**

"What's exciting about Voice AI is that we can change the way we're coaching and re-write our quality cards. We can move away from check-boxes and focus on real skill development. Using Voice AI helps us change behavior faster."

- Dale Sturgill,
VP Call Center Operations,
EmployBridge

The Guide
at a Glance

In this guide, we'll focus on quality assurance and Voice AI. Specifically, we'll share new ideas and techniques to enhance your quality programs and improve agent performance. There's a treasure trove of insights in every customer call, and utilizing Voice AI to monitor quality across 100% of calls is at the core of it.

Here's what you'll learn:

+ **An Introduction to Voice AI**

+ **Who Uses Voice AI Today?**

+ **Transformational Use Cases**

+ **Looking Forward: QA and Voice AI in the Future**

+ **Harnessing the Power of Voice AI: Best Practices**

+ **Choosing the Right Platform**

An Introduction to Voice AI

Voice AI uses cutting-edge speech and natural language processing technologies to analyze 100% of support calls with an ultimate goal of improving performance and the overall customer experience.

With Voice AI, key moments in conversations can be unearthed to provide a detailed picture of how the contact center and individual agents staffing it is performing.

Interaction analytics on areas like sentiment, emotion, dead air, hold times, supervisor escalations, and more are game-changing for businesses who previously had low call coverage volume, and Voice AI is the key to surfacing them with little to no work.

100%

+ **NATURAL LANGUAGE PROCESSING**

+ **SPEECH TO TEXT**

+ **80% ACCURACY**

+ **METADATA**

+ **KEYWORDS**

+ **SENTIMENTS**

+ **SILENCE + PAUSE ANALYSIS**

+ **CONTACT CENTER METRICS**

+ **GRAPHS + CHARTS**

+ **REPORTS + TRENDS**

+ **COACHING + TRAINING**

| 100% OF CALLS | TRANSCRIPTION | DEEP LEARNING | RESULTS |

Who Uses Voice AI?

Voice AI is used across organizations, from leadership down to the individual agents.

Operations Leaders and Customer Experience Leaders analyze 100% of voice calls to derive insights and in turn, drive efficiencies across the organization.

Supervisors and Trainers, specifically in Learning and Development turn their agents into top performers with more relevant and interactive coaching programs.

Quality Analysts are freed up for more strategic tasks, such as data analysis and coaching.

Agents receive transparent, data-driven, and objective feedback.

"For me, the best-in-class call center is one that is not run from the top down. It is an interactive, at the agent level, driven call center. The agents are your best place to find what you're doing well and what you're not."

- Dale Sturgill, VP Call Center Operations, EmployBridge

Why Voice AI?

Voice AI positively impacts contact center effectiveness in several ways.

Use Case	Before Voice AI	After Voice AI
QUALITY ASSURANCE	+ Quality checks take 30 minutes per call + Analysts use lengthy checklists + Scoring is subjective and calls selected at random	+ Analyze and score 100% of calls for every agent and Identify benchmarks and spot performance trends
TRANSCRIPTION	+ Accents, overtalk, industry specific terms, and spotty connectivity make speech-to-text transcription challenging	+ Accurate transcription (80+%) at scale delivers full view of performance and insights with confidence
EVALUATIONS	+ Performance is assessed from a few scored calls and minimal benchmarks across the organization	+ Full view into every voice call for every agent + Enables supervisors to spot trends and identify critical areas of improvement
COACHING	+ Blanket trainings that might not be relevant to groups of agents + Minimal data to create coaching programs	+ More targeted feedback to agents + Personal scorecards as reference points for more relevant training
PERFORMANCE ANALYTICS AND TRENDS	+ Nearly impossible to monitor organization-wide performance and monitor progress	+ Operation leaders can identify inefficiencies and trends and improve key metrics with data-driven training

Top Voice AI Use Cases

Voice AI provides a wide variety of benefits to improve processes across a contact center. Next, we'll dig into some real-world use cases of how Voice AI and quality automation is used today.

## Mandatory Compliance Tracking

Why It Matters

Regulatory compliance is paramount across all industries, most notably financial, insurance, and healthcare. It ensures the protection of customer data, backed by strict legislation to enforce it. As a result, monitoring mandatory compliance dialogues and categorizing voice calls relevant to specific compliance regulations is mission-critical.

Examples

+ Mini Miranda
+ Settlement Disclosure
+ Recorded Line Message
+ PII Redaction (credit card, account, SSN)
+ Lawsuit mentions

KPIs

+ 100% compliance
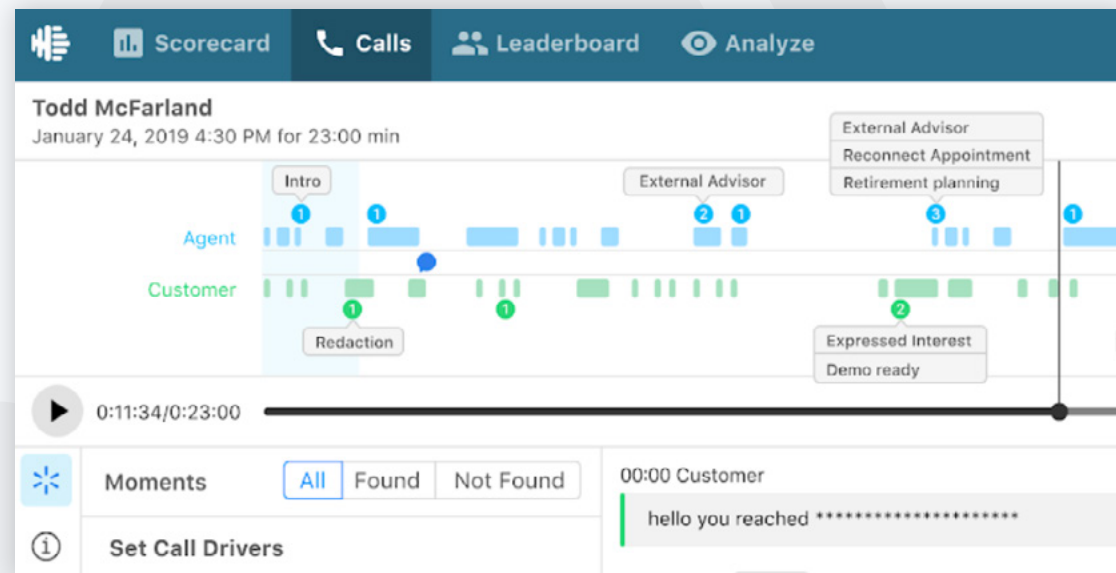
Openers & Closers

Why It Matters
The beginning of a conversation is important from both a customer experience and a compliance standpoint. The end of a conversation is also important for customer experience, and it also is an opportunity to both better confirm how the call went and create next steps.

Examples
+ Mention company name
+ Self introduction
+ Offer assistance
+ Customer verification
+ Recorded line message
+ Thank customer for calling
+ Offer further assistance

KPIs
+ Increase positive sentiment
+ NPS
+ Adherence to brand standards
+ Lower average handle time

Supervisor Escalations

Why It Matters

Supervisor escalations are a strong indicator of a negative customer experience, a metric for agent call-handling, or an organizational inefficiency. Escalations in any contact center are costly due to the amount of time and resources required to resolve them.

Examples

+ Issue cannot be solved by agent
+ Issue is outside of the agent's role

KPIs

+ First call resolution (FCR)
+ Supervisor escalation rate
+ Average speed of answer (ASA)
+ CSAT
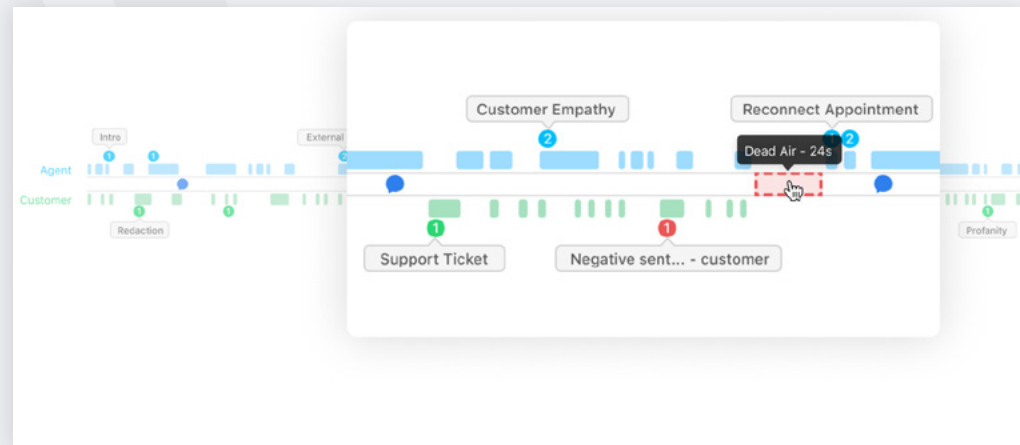
Customer Sentiment Analysis

Why It Matters

Customer sentiment analysis is an indicator of how people feel about a brand, its products, and its service. Sentiment is determined based on words, tone, and volume.

Examples

+ Negative experience based on agent, process, or product/service

KPIs

+ Customer satisfaction (CSAT)
+ Reduced negative sentiment
+ Improved products and services

Looking Forward: QA In The Future

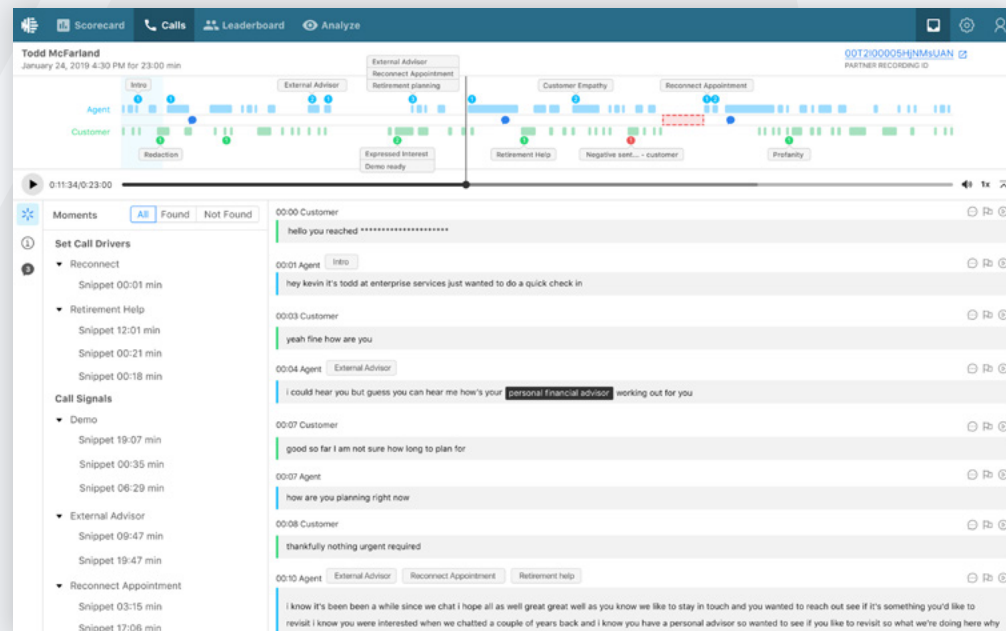With Voice AI quality programs are growing more automated, more accurate, more efficient, and more relevant to agents. Here are some of the top trends we see impacting QA:

MORE AUTOMATION

Analysts no longer have to manually score calls. From transcription to analysis, the QA process becomes more automated with analysts focusing on the most subjective tasks, such as insights gathering.

MORE ACCURACY

Transcription of voice calls will continue to improve as AI is trained and new features make it more intuitive. Today, we see 80%+ transcription accuracy with some transcription as accurate as 86%.

MORE INTUITIVE

As AI gets more intuitive, it will surface comprehensive reports and note trends.

IMPROVED EVALUATIONS

Evaluations allow teams to score individual agent performance and pin-point areas of improvement. Evaluations will grow more automated and interactive with less of a focus on check-marking boxes and greater focus on skill development.

IMPROVED INSIGHTS

AI will open up opportunities for next-generation interaction and sentiment analytics. By using text and acoustics to analyze conversations, AI will help contact centers better understand customer emotions and agent performance.

IMPROVED AGENT COACHING

With AI, supervisors will be able to prepare for targeted coaching sessions in minutes and ensure every session is relevant to that agent, as well as backed by data.

WHAT IS TONALITY BASED SENTIMENT ANALYSIS?

Analyzing a voice conversation and determining how the speaker is feeling based on multiple granularities, beyond what words were used, but also how those words were conveyed.

Best
Practices

Insights from Contact Center Leaders

We spoke with some of the top leaders in global contact centers to get their perspective on best practices to consider when implementing Voice AI. Here's what we learned:

1 Be Patient and Start Small

Voice AI empowers organizations to gain full visibility into agent phone interactions. And with that visibility, they can better enable their agents and improve the overall customer experience. That's very powerful, but don't try to do everything at once.

> *"Voice AI requires the alignment of several things in order to be implemented correctly, but patience is one of the biggest ones.* ***You don't want to approach this as a one all be all solution. You can't go out and try to boil the ocean. Don't try to do everything all at one time.*** *If you do, you'll lose sight of the quick wins and low hanging fruit opportunities that gain buy-in, get quick ROI and build confidence throughout the organization."*

Kyle Horn
Director of Speech Analytics @ ERC

2 Focus on Opportunities with a Quick Turnaround for ROI

A key benefit of Voice AI is identifying inefficiencies, sometimes simple ones that can have a huge impact on a business. EmployBridge, a global industrial staffing firm, discovered that "calendar full" came up on 30% of calls. Looking at it more closely, they realized that they were missing out on opportunities to interview nearly 2,000 more candidates each week due to inefficiencies in staffing and calendaring. They took the insight to senior leadership who fixed the problem.

> *"We're able to identify situations like "if we had more calendar spots, we could schedule more people," and* ***it came from a word search and seeing how many times someone said their calendar was full or there were no appointments available.*** *The words that we used were there."*

Dale Sturgill
Vice President of Call Center Operations at EmployBridge

3 Act with Urgency to Create Training and Coach Agents

Once a critical insight is identified with Voice AI, supervisors and managers can quickly address it through targeted training programs, tailored down the individual agent.

*"We identified a gap on our team where agents weren't consistently using our recorded call disclosure on outbound interactions. In real time, we had a clear picture of which calls were impacted along with the associated agents. This information allowed us to identify our process guideline was buried in our internal resources. **We broke it out as its own resource, revisited training, communicated the importance to our team, and coached outliers accordingly. We saw a 14% increase in utilization within two weeks and are continuing to monitor improvement over time."***

Kyle Kizer

Manager of Customer Service
@ Root Insurance

EmployBridge Creates Interactive, Agent-driven Quality Program with Observe.AI

With 100% call coverage and tailored agent training, EmployBridge drives additional revenue and lands more workers jobs.

THE RESULTS

Provided coordinators with feedback across 10x more calls (up from just 2-4 calls/month prior)

Reduced QA staff from 12 to 6 and repurposed half its staff in new strategic roles

20% decrease in agent training time

86% increase in QA efficiency

Drove estimated $18,759 in additional revenue per week by using voice insights to increase efficiencies - $864k each year

Helped estimated 1,875 additional workers each week land new jobs

EmployBridge's mission is to deliver a stronger workforce and create a better work life for workers in manufacturing, logistics, and transportation. Placing 400,000 associates annually to 12,000+ companies, EmployBridge's success over the last three decades has hinged on quality conversations with candidates and the productivity of the coordinators on the front lines.. So higher quality feedback and tailored coaching is mission-critical.

With 4 million yearly calls, a combination of speech analytics and a next-gen quality management tool is the key to gaining insight into organization and agent performance and developing an agent-driven quality program.

Challenges & Approach

EmployBridge set out to solve three distinct challenges in building their agent-driven quality program. In doing so, their program would foster better coordinators, while also providing a deeper understanding of strengths and shortcomings across the organization.

1. Make QA More Transparent and Efficient: Analysts were only reviewing 2-4 calls per agent per month, using subjective scoring and lengthy, multipage QA forms. EmployBridge wanted to provide higher quality feedback for agents and score calls in a more efficient, fair way.

2. Uncover Crucial Interactions: With tens of thousands of calls per month, EmployBridge wanted to extract the insights at scale to better understand areas of improvement and create better coaching programs.

3. Train Agents with Urgency: With a wealth of insights and analysis, EmployBridge wanted to train the right people on the right topics as quickly as possible.

Results

From Spreadsheets and Checkboxes to Platform: EmployBridge is able to quality check 10x more voice calls, meaning they can now QA hundreds of calls per coordinator per year. This solves the problem of subjective QA processes, and creates more accurate insights per agent and across the entire organization.

More Tailored and Relevant Coaching: With a wealth of insights, EmployBridge had the foundation for building a more relevant, more targeted coaching program for their coordinators. This includes identifying negative customer interactions - supervisor escalations, negative sentiment, compliance breaches - and being able to address it with tailored training.

Turning Inefficiencies Into Value: A simple inefficiency can have a huge impact on the business. Through Observe.AI's unsupervised insights, EmployBridge discovered that "calendar full" came up on 30% of calls. Looking at it more closely, they realized that they were missing out on opportunities to interview nearly 2,000 more candidates each week due to inefficiencies in staffing and calendaring. They took the insight to senior leadership who fixed the problem and are now eager to do more with voice insights in the future.

> *"With Observe we can look at where we can reduce average handle time, where can we create efficiencies, where can we add things to our process that may not exist. It's a full, interactive tool for us to find our shortcomings, what we're doing well, what we need to put into place, and in the future doing QA unlike any other call center."*
>
> **- Dale Sturgill,**
>   Vice President of Call Center Operations

What To Look For In a Voice AI Partner

Now that you understand the use cases, benefits, and best practices, you can use to transform your quality assurance program. Here's what to look for in a partner.

☐ **Industry Agnostic Expertise**

What companies are using the platform? What industries are finding value in the platform? How are companies finding value with their current solution?

☐ **Transcription Accuracy**

The quality of the insights lays in the accuracy of the AI services doing the analysis. What are the % SLAs for each AI service on the platform? Does the AI vendor analyze only text-based analysis, or the raw audio to include tone and volume?

BENCHMARK
80%+
TRANSCRIPTION ACCURACY

☐ **Ease of Implementation**

Time to value is directly correlated with implementation and onboarding. Does implementation require professional services? What are the different phases of implementation and how long is each phase? Does implementation require custom development and deployment? Once implemented, does it include guided onboarding? Is onsite training included at no cost?

3 WEEKS
AVERAGE TIME TO VALUE FOR A VOICE AI PLATFORM
(YOU GET IMMEDIATE VALUE — 100% CALL COVERAGE — AS SOON AS YOU GO LIVE)

Ease of Use

How easy is it to derive value from the platform? Are there pre-built interactions built-in? How much manual set up is required? Is it easy to add and monitor new interactions? Once the analysis is done, how seamless is it to understand insights and drive action?

Customer Success

Does the team have dedicated customer success teams beyond technical implementation? Do they have industry expertise and offer guidance on how to leverage the platform to achieve maximum ROI. Are integration and on-boarding included, or part of an additional set-up cost?

Security and Redaction

Is the platform secure? Is user data protected? Does that platform have security features built into it like redaction on recordings and transcription to mask PII? How is data stored and transferred and is it encrypted? Is the Platform GDRP Compliant?

30%
OF AGENTS

REPORTED THAT THEY HAVE ACCESS TO CUSTOMERS' PAYMENT CARD INFORMATION OR SSNS ON FILE EVEN WHEN THEY'RE NOT ON THE PHONE WITH THE CUSTOMER.

Innovation

Is the platform finding new ways to innovate Voice AI, including new ways to analyze and visualize performance and more ways to run targeted coaching programs? Are they proactively improving security both on the platform and for their customers? Are they working on new ways to expand the capabilities of Voice AI in a contact center, like language translation and AI-enabled recommendation engines?

OBSERVE·AI

Observe.AI, the leader in AI-powered agent enablement for voice customer service, brings coaching and conversational insights to the world's top brands to improve the customer experience. With its Voice AI Platform, which leverages the latest Speech and Natural Language Processing technologies, organizations quality check 100% of calls, ensure compliance, and turn agents into top performers. Observe.AI is trusted by more than 100 customers and partners, including, Tripadvisor, Microsoft, ERCBPO, Talkdesk, and more. Backed by Scale Venture Partners, Nexus Venture Partners, Y Combinator, and Emergent Ventures, Observe.AI's headquarters is located in San Francisco with offices in Bangalore and Dallas.

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